Stanford ACT  
Project Leader Roundtable: Challenges of Teams and Clients  
December 11, 2010

**Topics**
- Significant drop-out of volunteers on the team
- Maverick team members
- Motivating volunteers to dig deeper into research and thinking
- Other meeting notes

**Introduction**
On this Saturday morning, seven ACT project leaders (PLs) came together to discuss challenges of working with teams and clients. The thoughts and ideas from the session, reported below, are not intended as the way to handle such issues; instead, they are offered as some ways to consider handling such issues.

**Challenges**
Initially, participants identified these issues that had challenged them in the course of leading projects:

1. Significant drop-out of volunteers on the team
2. Maverick team members (even to the extent of contacting the client and other team members with dissident views)
3. Change in the client’s environment requires change in the project scope
4. Executive Director not fully engaged. BOD not fully engaged.
5. Motivating volunteers to dig deeper into their research and thinking
6. Clearly defining the project: To meet the client’s perceived needs; To add value; and To be interesting to volunteers.
7. Managing the process so the team is comfortable with initially investigating broadly then subsequently narrowing to identify key issues, findings and recommendations.

We then discussed three of these challenges in some depth.

**Challenge: Significant drop-out of volunteers on the team**

- Assign wavering volunteer to a sub-team topic that interests him/her.
- Be certain that team members perceive that there is enough challenging work for the team so individuals know they are needed and will be challenged.
- When screening volunteers before forming the team, be cautious about people who are dealing with mid-career issues or family issues, like a coming baby, that may pull them away. This doesn’t mean avoiding those people but if half of your team is in some sort of personal transition, you may later be dealing with significant drop-out.
- In screening or first meeting, ask volunteers to speak up early and honestly about arising conflicts.
- Faced with probable depletion of the team, be up front with the client and consider reducing project scope.
Challenge: Maverick team members

- If PL perceives that a team member has a personal agenda, like setting up a personal, paid consulting gig with the client, deal with it and, if called for, ask that volunteer to withdraw from the team (first consult with ACT’s ED – Jon).
- Some mavericks are worth the additional management effort to keep them engaged with the team. For example, a volunteer who brings an unusual perspective to the issues may lead the team to insights otherwise missed.
- Team meeting “mavericks” (not so much mavericks as people who are disruptive and/or talk too much). Sometimes such behavior is due to initial nervousness and will calm down as the volunteer becomes more comfortable with the team. Often group dynamics will work to mitigate the problem.

Challenge: Motivating volunteers to dig deeper into research and thinking

- Have brainstorming sessions during which the PL encourages team members to offer solution ideas while remaining open to different ideas as the team’s research findings emerge.
- Match research projects with the interests and skills of the individuals. This may require meeting individually with team members to draw out their interests and motivations.
- Be aware that some research may be beyond the skill set of the volunteer and that sometimes what appears to be a lack of commitment may actually be uncertainty about what to do or whom to speak with. Have sub teams select leaders who are then accountable for deliverables. Make sub teams responsible for presentations to the client. Team dynamics will usually cause teams to perform.
- Consider reshuffling sub teams if they don’t seem productive.
- PL treading lightly does not work well; however, PL must be aware of individual differences: some volunteers accept criticism/feedback well: others not so much. A PL may choose in some circumstances to be directive, in other circumstances to work for team consensus, and, in other circumstances to intentionally allow for a leadership “vacuum” to see who will step forward. With experience, a PL learns to adapt his/her leadership approach to particular client and team situations.

In general, volunteers and clients want to know what to expect and what is expected of them. An effective method is to set expectations in a consensual manner up front. Examples: If PL wants each sub team to use a common format for client presentation, the team should discuss and agree on that format before the presentation preparations begin. If the PL intends to review and give feedback to sub teams s/he should discuss that intention and get the concurrence of the sub teams at the front end. [Related note follows re: leadership styles. – Jon]

Other meeting notes

- Opening comments by meeting facilitator, Susan Linton
  
  **Purpose of the roundtable: Challenging team and client situations**
  
  We’ve found that many ACT project leaders would like to interact with and learn from other ACT project leaders, yet the opportunities for
sharing across project teams are scarce. Thus one reason for today’s roundtable is to provide a forum where project leaders can discuss challenges they’ve faced or are currently facing. During our previous roundtable, the main topic that the participants wanted to discuss was: how to uncover the client’s real issues. We’re taking a slightly different approach today, by focusing on real world examples. You’ll hear how other people would have reacted in the same situation and learn new approaches and perspectives.

- PL leadership styles
  In the discussion of setting expectations up front, above, a participant observed that volunteers generally prefer a consensual leadership style. He described the style of two experienced PLs who skillfully guide projects in directions that are of greatest interest to team members, perhaps leaving unexplored some matters that may relate to the client’s issue but fall outside of the interests and/or skill set of the team.

- Project process issues
  Before the group discussed specific challenges, e.g., those reported above, the following project process issues were briefly discussed.

  - **Client discomfort.** Projects occasionally lead the teams into topics and/or issues that cause client discomfort. Examples: (1) A client may request a marketing oriented project and the team may find that the client has no internal agreement about its direction and strategies. Should the team change the project to a strategy study or do what can be done in the circumstances to create a marketing plan? (2) A team may determine that management or the board needs personnel changes and may recognize that communicating that fact, no matter how tactfully and skillfully done, may cause the client to be unhappy with the team and with ACT.

    Observation: *We need to be “honest brokers” in the sense that each team must agree about scope and where the team is going in a way that has integrity and, if necessary, let the chips fall where they may. We must maintain and enhance the reputation of the GSB; however, unlike for-profit consulting organizations, we don’t need to be concerned that a client may not rehire us for a future project.*

  - **How to share PL techniques and experience.** Given the issues that PLs commonly encounter, those identified in this and other PL gatherings, how can ACT set up a way that PLs can access the wisdom of others?
    - Ask ACT, Ask an Expert, and the PL Manual are available and attempt to provide such access.
    - Having a co-PL gives the lead PL someone to consult with.
    - ACT is currently piloting a PL Advisor program. This round the PL Advisor is working only with the one team that has relatively inexperienced co-PLs; however, if this appears effective, ACT could promote the PL Advisor as a resource for all PLs.
    - Round table meetings like this one are good for exchanging ideas and for getting to know other PLs who might be a resource in the future.
An individual might be assigned to each PL issue, asked to write something about the issue to be posted in PL Resources, and to take ownership of that issue. [E.g., Wikipedia has “owners” of each of its topics – anyone can contribute to a topic but the owner is responsible for the content that stays on the Wikipedia site. –Jon]

Discussion Boards, a coming feature of the GSB Alumni Groups social networking software, is another tool.

An underlying challenge for ACT is to build a community of people who are interested in and willing to participate in such exchanges of ideas and wisdom, whether such participation be in round table discussions, social networking, or otherwise.

- Side issues of note: 1. How to define project success and how to help the team understand and appreciate victory; 2. The year end holiday season is disruptive. Should ACT consider an alternative timeline?
- This gathering was the second PL round table of the 2010-2011 project cycle. The first round table, held on October 16, 2010, focused on the beginning phase of projects, specifically, uncovering real client issues.

Participants
Tony Ramsden
Al Davis
Steve Bowling
Jon Richards, note taker
Jim Dern, baker extraordinaire
David Olson
Vince Forte
Susan Linton, facilitator
Dr. Eugene Fram, invited guest